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AUGUST 1983

Lawn&Garden Marketing

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The BIG Hardware Show story

page 20

Growing Market

page 1

AUGUST, 1983 VOL. 22, NO. 7 PUBLISHED 10 TIMES ANNUALLY

Lawn&Garden Marketing®

The merchandising magazine for lawn, garden and leisure living products.

17 ABC's of Spring-flowering Bulbs. Directions on bulb handling to reassure even the nervous novice. Includes new data based on recent tests.

24 New Products Exposition. LGM presents a cross-section of NHS New Products Expo entries for our readers' pre-NHS assessment. See these at the big show.

64 The best defense... Highlights of a seminar on product liability puts suppliers and sellers on guard.

8 Winners and losers: retailers rank industry promos. Suggestions for future marketing strategies are included. Seventh in the series of articles on Growing the Market.

20 The big story of the big show—new products; expanded lawn and garden agenda. NHS '83 will be bountiful for L & G.

50 Product movement survey, spring, 1983. Trends are indicated as retailers report recent performance of product lines.

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Coming in September: The Arett story, Growing the Market, a five-part special package. New product technologies that exemplify the state of the industry. ABC's of Blade-Brake Clutches.

Postmaster: Return form 3579 to Lawn & Garden Marketing, P.O. Box 12942, Overland Park, KS 66212-0930.

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Power Equipment Report

Vol. 4 No. 7 August, 1983

OPEI elects new officers

David S. Rolston, president of the Wheeler Manufacturing Co., Harvard, IL, was elected president of the Outdoor Power Equipment Institute (OPEI) at its 31st annual meeting.

The OPEI is the national trade association representing manufacturers and component suppliers of consumer outdoor power equipment used around the home.

Rolston has been president of the Wheeler Co. for eight years and served as an officer of the Cotter Co., the parent company of Wheeler for 14 years.

Robert W. Reid, manager, Outdoor Power Equipment Group (Lawn-Boy and Ryan) of the Outboard Marine Corp., was elected vice president. He is responsible for the convention sponsorship activities and future planning efforts of OPEI.

David S. Rolston

Robert W. Reid

Warner C. Frazier

Jairo A. Estrada

Kendrick Melrose

Clarence H. Yahn

During his OMC career, Reid has represented the OMC Power Equipment Group as a director of OPEI and chairman of the technical and marketing committees.

Warner C. Frazier, president and chief executive officer of Simplicity Mfg. Inc., Port Washington, WI, and president of OPEI, was appointed to the executive committee for 1983-84.

The executive committee is composed of the president, vice-president, secretary-treasurer and one member of the board-at-large of the association.

Frazier has been in the consumer durables and industrial products field for more than 25 years in marketing and management positions at factory and retail levels. He has served on the board of directors of OPEI since 1980.

Jairo A. Estrada, president of operations of Garden Way Inc., Troy, NY, was elected secretary-treasurer.

Kendrick B. Melrose, president of the Toro Co., Minneapolis, and Clarence H. "Chuck" Yahn, president of Aircap Manufacturers, Tupelo, MS, were elected to the board of directors of OPEI for three-year terms.

1984 OPE industry outlook

Manufacturers of outdoor power equipment products, responding to a survey taken in April, forecast a 2 percent decrease in shipments of walk-behind rotary mowers for the 1983 model year, but an increase of 4.4 percent in shipments in 1984.

This and other data were reported to members of the Outdoor Power Equipment Institute during the annual meeting of the OPEI in June. The survey of the OPEI members was conducted by the Outdoor Power Equipment Marketing Group of Roper Corp., and was presented to the association membership by Jerome M. Stumbras, group vice president of Roper's Outdoor Power Equipment Marketing Group.

INDUSTRY SHIPMENTS—4 product categories

	1980	1981	1982	Projected 1983	Forecast 1984
Walk-Behind Rotary Powered Mowers	5,700,000	4,600,000	4,600,000	4,500,000	4,700,000
(% Change)	- 3.4	- 23.9	0	- 2.1	+ 4.4
Lawn Tractors/Riding Mowers	808,000	620,000	654,000	653,000	660,000
(% Change)	- 5.8	- 23.3	+ 5.4	- 0.1	+ 1.1
Riding Garden Tractors	220,000	151,000	146,000	143,000	141,000
(% Change)	- 13.4	- 31.4	- 3.3	- 2.1	- 1.4
Walk-Behind Tillers	667,000	501,000	497,000	490,000	494,000
(% Change)	+ 16.8	- 24.9	- .8	- 1.4	+ .8

SOURCE: OPEI

The report noted that industry shipments of these units through April were down 10 percent compared to the comparable period for 1982, but that a strong May and June push could bring the total shipment figure for the model year, which ends on Aug. 31, close to a level that would mean only a 2 percent decline.

The responses of 22 manufacturers were averaged to provide the data. Other highlights of the survey:

- Industry members are not projecting any major changes in sales of lawn tractors/riding mowers in 1983 or 1984. With the increase in shipments reported through April 1983, industry totals for 1983 could end up higher than member-forecasts.
- Based upon the December 1982 OPEI survey on riding garden tractors, industry members projected a 2 percent decrease in 1983. Industry shipments of the tractors through April 1983 reflected a 16 percent decrease.
- Industry members project a 1 percent decrease in walk-behind tiller sales in 1983, followed by a 1 percent increase in 1984. Industry shipments through April 1983 indicate the yearly total could be below the industry projection of 490,000 units.

Product Movement Report, spring, 1983

Eight product lines sold through four key classes of retailers were measured by *LGM* to indicate trends but not to measure total retail sales volume.

Retailers responding to the quarterly product movement survey reported an overall flat sales curve for the 1983 spring selling season. In six of the eight categories, retailers reported that sales were about the same as last year. In the other two categories, increases were reported.

Walk-behind mower sales were reported to be about the same as or better than last year by two-thirds of the respondents. Sales were up significantly in the Northeast, with one-sixth reporting increases of 15 to 24 percent and one-eighth reporting increases of 25 percent or more.

Riding mowers and lawn tractors sold about the same this year as last year, according to respondents. An increase was reported by a little more than one-fifth of the retailers. Sales fared better in the Northeast and South regions, where about 60 percent reported sales to be the same or better.

Summing up data for all regions, 35 percent of the respondents reported that sales of rotary tillers were about the same this year as last year. However, only 16 percent reported sales to be up, while 26 percent reported decreased sales, giving the overall picture a downward tilt. The South region showed the largest decrease, 33.3 percent. Of those, 17 percent reported sales to be down 50 percent or more.

Replacement parts have continued in the boom stage they have been in for the last several seasons, especially in the Northeast. Nationwide, 63 percent of the respondents said sales were up, and only 3.5 said sales have decreased. Continued high sales of replacement parts indicates that many consumers are spending money repairing expensive power equipment, rather than buying new machinery.

Garden tools are holding their own, according to nearly half of the respondents, who said sales were the same as last year. Reports of sales increases outnumbered reports of decreases in the Northeast and South.

In lawn fertilizer, more respondents reported an increase than reported decreases. Most of those reporting increases said the increases were between 10 and 25 percent more than last year. A significant report of decreased sales (34 percent) came from the Northeast.

Grass seed sales were flat with 30 percent of the respondents reporting sales levels below and above last year's. The number reporting sales to be the same, 36 percent, was higher than those reporting decreases or increases. The West fared the worst, with 55 percent reporting decreased sales and 27 percent reporting decreases of 25 to 50 percent.

Packet seeds sold the same to better compared to last year in all regions except the North Central. Most of those reporting increases said sales were 10 to 25 percent higher than last year's.

Eight product lines measured

		TOTAL %	NORTHEAST %	N.CENTRAL %	SOUTH %	WEST %
Walk-behind Mowers		87.0	89.8	87.3	86.2	84.4
	Up	30.3	43.6	29.5	22.4	31.3
	Same	36.3	30.8	33.3	48.3	31.3
	Down	20.4	15.4	24.5	15.5	21.8
Riding Mowers/ Lawn Tractors		71.0	69.2	69.6	77.6	65.6
	Up	22.9	28.2	22.6	27.6	9.4
	Same	31.6	30.7	29.3	32.8	37.4
	Down	16.5	10.3	17.7	17.2	18.8
Rotary Tillers		77.5	80.0	83.6	71.8	64.7
	Up	16.2	12.0	13.1	20.5	23.5
	Same	35.2	48.0	44.3	18.0	23.5
	Down	26.1	20.0	26.2	33.3	17.7
Replacement Parts		97.9	100.0	96.7	100.0	94.1
	Up	63.4	68.0	63.9	59.0	64.7
	Same	31.0	32.0	31.2	30.7	29.4
	Down	3.5	.....	1.6	10.3	.....
Garden Tools		94.5	94.7	89.6	100.0	96.2
	Up	24.9	36.8	16.4	24.0	30.8
	Same	45.9	44.7	38.9	62.0	34.6
	Down	23.7	13.2	34.3	14.0	30.8
Lawn Fertilizer		94.5	97.4	91.0	96.0	96.2
	Up	35.4	29.0	35.7	38.0	38.5
	Same	34.3	34.2	29.9	40.0	34.6
	Down	24.8	34.2	25.4	18.0	23.1
Grass Seed		96.7	97.7	96.2	100.0	100.0
	Up	30.4	41.7	26.9	32.3	9.1
	Same	35.9	20.8	30.8	51.6	36.4
	Down	30.4	29.2	38.5	16.1	54.5
Packet Seed		95.7	95.8	92.3	96.8	100.0
	Up	32.6	25.0	26.9	42.0	36.4
	Same	33.7	41.6	19.2	38.7	36.4
	Down	29.4	29.2	46.2	16.1	27.2
Current Inentory of Walk-behind mowers (MEDIAN NO. OF UNITS PER STORE)		20 units	20 units	18 units	26 units	15 units

Because of multiple responses, percentages, do not add to 100%

COMPLIANCE MOWERS: the first year

Retailers, consumers, rebounding from sticker shock according to preliminary data from a special *LGM* survey on mower sales.

■This year of the massive introduction of the new compliance mowers brought many reports of sticker shock as the public eyed the higher prices on walk-behind mowers on the retailers' display floors. For the most part, however, data show that the retailers took the jolt from the mandatory standards in stride, and will be coming back for greater numbers when ordering 1984 models.

The scenario of the sales year was close to what manufacturers and retailers had expected: the non-compliance mowers, with their lower-price tags, had a higher percent of sell-through than did any of the categories of the new mowers.

Engine-kill, or clutch

All mowers manufactured after June 30, 1982, must have the 3-second blade stop, achieved either by killing the engine, or by stopping the blade with a clutch system. Of the compliance mowers, those with the engine-kill systems and rope restart were the lowest in cost, and were the most popular with the retailers and with their customers. (See table.) This lower-price category includes both those with the ERS (extended-rope start, sometimes called zone start) and the 360-degree foot-shield units.

Fifty-eight percent of the retailers responding to the survey handled the zone start compliance models, and 22 percent reported they handled the 360-degree foot-shield models. This category (includes Snapper and Flymo brands) does not require that the rope be high on the handle as is required of the zone starts. Fifty percent of the retailers responding to the survey handled the BBC units, and 43 percent handled the EAS units.

Convenience vs. price

The responses from the retailers show that price-oriented customers are clearly in the majority. But, when it comes to placing orders for the 1984 model year, the retailers indicate that higher priced, convenience-oriented models will edge up faster than the ERS and 360-degree shield models.

The EAS (electric-alternator start) models also will show a higher-percent gain. The data show that the number who planned to order more and the number who planned to order less of the zone start and of the 360-degree foot shield models was about equal at the time the survey was taken. It should be noted, nevertheless, that there still may be a stronger element of indecision among the BBC dealers. Twelve percent of these dealers gave no answer to the question asking if they would order "more," "same," or "less" units in their first orders for 1984. The data show that the "no answer" column representing the responses from the retailers of the lower priced engine-kill/rope-start units showed fewer responses: only 6 percent.

The data showed that the retailer inventory of non-compliance mowers—those manufactured prior to June 30, 1982—was significantly reduced. Three out of four of the retailers responding to the survey had the non-compliance units in stock at the beginning of the season. Sell-through of these units was good.

Quality questions

Responses from the retailers gave a mixed picture as to the question of the quality of the new generation of mowers. Many state that it will take two or three years in the field for the real picture of the quality of the blade-clutch systems to emerge. Meanwhile, however, there was no cohesive outcry from associations of retailers, distributors, manufacturers, government agencies, or media over extensive problems of quality or safety.

The isolated criticisms of retailers over the imposition of the safety standards and suggestions of serious safety problems that will result from the mandatory standards were balanced by retailers with just the opposite point of view. The latter category say that they can "sell safety" and that many customers are aware of the new devices intended to protect the operators of mowers, and seek them out. Profitability of the new mowers was somewhat hard to evaluate this year because of the availability of the non-compliance mowers. However, many retailers said the new mowers were as profitable or more profitable due to such features as easier-starting engines and safety devices. Other retailers would debate this question, and said the new mowers are harder to start, and overpriced.

Awkward, excessive controls

A frequent comment among the respondents to the **LGM** survey was the awkwardness of starting some models because of too many controls, or awkwardness of the positioning of the starting controls.

"Too hard to start; throws operator out of balance when pulling rope on top of the engine and holding down the bail on the handle," said one retailer. However, he said that consumer acceptance was better than he had expected. Other critical comments were typified by these:

"Zone start models still hard to start when hot..." continued...

Table 1 — Retailers handling mowers

Type of mower	% handling
Zone start	58
360-degree shield	22
Blade-brake clutch	50
Elec. alternator start	43

Source: 1983 LG&I mower survey (multiple answers — do not add to 100%)

Table 2 — Manufacturers marketing mowers

Type of mower	Number (mfrs.) marketing
Zone start	33
360-degree shield	2
Blade-brake clutch	9
Elec. alternator start	20

Source: November 1982 LG&I survey of manufacturers (Some manufacturers produce more than one type of compliance mowers.)

continued from page 54

"Seems to be the same quality we've had in the past. We'll find out after these new units have been out a year or two."

"There are still wrinkles in the new engine design that have caused retailers some problems. (They include) the possibility of overfilling the oil chamber."

"Approximately 25 percent do not want to fool with extra levers, handles, etc."

Need explanation

One dealer wrote, "Consumers accepted compliance mowers if the sales person took the time to explain safety facts and how the mowers work. I believe that the BBC type is going to be the best buy for the customers. I sold compliance mowers with no problem. I sold the mowers on the safety factors for children and women mowing lawns. Some dealers confused customers by having compliance and non-compliance mowers on display for sale."

One chain store with sales outlets in several midwestern and southern states started off the year with 5000 non-compliance and 1500 compliance mowers. This company reported quality as being good and profitability on the compliance units being *as* good as on the pre-compliance models. Another volume retailer perceived an "extreme dislike" for compliance mowers and handled only non-compliance units, selling 500 of its 800-unit beginning inventory.

Another chain with stores in seven or eight states started out with an inventory of over 7,000 units and reported that sales at the time of the survey had exceeded expectations by about 10 percent. This respondent said, however, that the true picture would not be known until the season was over.

Certain specialty retailers said they would discontinue selling mowers rather than handle the compliance units. One dealer said, "I expect compliance to be thrown out after the two-year trial period." □

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Bedding plant business continues to expand

Although many of the trends and factors remained the same, the unusually late, wet spring weather may have affected some of the projections made when the article was written by Alvi O. Voigt in the pre-selling season for 1983.

■If "the best surprise is no surprise," then the 1982 bedding plant business had the best surprise and, so will 1983.

Bedding plant prices averaged about seven percent higher in 1982, not quite as high as earlier price advances from 1979 to 1981 at 8.5 percent to 11 percent when the economy was experiencing more severe inflation. About seven of every 10 BPI respondents achieved higher prices in 1982, fewer than 1979 to 1981; about three in 10 maintained similar prices in 1982 as in 1981. An expectation of bedding plant price increases averaging about five percent in 1983 seems reasonable with the lessening of cost-push influences of inflation and energy even though demand-pull effects continue unabated.

More BPI members enjoyed better sales in 1982 than in 1981 as four of every five members, 82 percent, recorded better sales in 1982 compared with 1981's three of every four. Comparatively better 1982 sales were even more encouraging when recognizing that BPI members were intending the second largest percentage increase in production on record. Respondents had indicated production intentions of 14 percent increases for 1982, second only to the 14.7 percent intentions for the 1978 season.

Production intentions for 1983 are a bullish 12.3 percent increase, about one percent above the 11.5 percent average over the years. However, there was about one in 14, 7 percent, of the respondents experiencing a worse sales year in 1982 than 1981, just slightly improved from 8 percent in '81.

continued...

Alvi O. Voigt is the agricultural economist and marketing specialist at the Pennsylvania State University College of Agriculture. This analysis is based on results of the thirteenth annual bedding plant survey of Bedding Plants Inc. members.

13-year sales trend

Year	Better Sales	Same-or-Better	Same Sales	Worse Sales
1970	78%	93%	15%	7%
1971	88	98	10	2
1972	89	97	8	3
1973	86	95	9	5
1974	95	98	3	2
1975	92	98	6	2
1976	88	98	10	2
1977	81	96	15	4
1978	73	90	17	11
1979	86	97	11	3
1980	84	95	11	5
1981	75	92	17	8
1982	82	93	11	7
Averages	**84.4%**	**95.4%**	**10.9%**	**4.7%**

Source: Bedding Plants Inc.

Not everyone in the bedding plant industry is enjoying a good market situation, but recently available U.S. Census statistics have documented the overall industry's dramatic almost-five-times growth from 1970 with $61.6 million producer value, to 1979 with $285.5 million. Since 1979 the USDA *Floriculture Crops* reports, for 28 states, when interpolated, might place the bedding plant industry producer value at $396.8 million in 1981, a 39 percent rise in the two years since the 1979 Census, almost an eighth of a billion additional dollars for the 1979-81 period.

Best-sellers ranked

In 1982 impatiens was the best-selling plant, as reported by more than one of four or 27 percent responding. The second best-selling bedding plant was the petunia, although petunias have constantly been losing ground, having been the best-selling item by 47 percent, almost half, in 1976 and dropping in 1982 to less than 22 percent or one in four respondents. Tied for third place were tomatoes and cutting geraniums, each at 16 percent, as best-sellers. A wider variety of other bedding plants was reported as 1982 best-sellers because, apparently, a greater diversity of product mix is occurring.

Impatiens continues as the dominant, planned-increase item for 1983, as usual. Geraniums from cuttings assumed more importance, grabbing second place from marigolds as marigolds dropped to a three-way tie for third place with vegetable plants and begonias. Petunias were in sixth place as a major planned-increase item for 1983.

Demand to continue in 1983

There's no doubt that markets have absorbed large consecutive annual quantities of bedding plants at sufficiently attractive prices to continue optimistic expansion by established and new growers. Caution and market analysis should be exercised by those individuals experiencing market difficulties that were not weather-related. A strong expansionist market is continuing but obviously not everyone will share in proportionate growth and success.

Incorporating BPI's production intentions of 1982, 14 percent, and 1983, 12.3 percent, to the 1981 United States' estimate of $396.8 million, producer value, 1983 could exceed one-half billion dollars at the grower level, and, roughly, $900 million at retail. This translates to $3.91 bedding plant expenditures per person for 1983. It would appear that a total market saturation point will not be reached in 1983, not with such an estimated, seemingly low, per capita consumption figure. In all likelihood, steady strong bedding plant growth will continue for some time to come. There's no reason to expect demand to soften; demand should continue strong, actually aided by an anticipated sluggish economy in 1983 as people turn more to gardening for food, fun and leisure.

Bedding plant sales comparison

For the last 13 years, BPI annually has surveyed its members to determine results of the current sales season. In comparison from previous BPI surveys, bedding plants in 1982 were judged as shown in table at left.

Eighty-two percent of the respondents in 1982 registered better sales than in 1981. Seven percent of the 1982 respondents recorded worse bedding plant sales than the previous year. So, 1982 had relatively improved sales from 1981 although somewhat below the 13-year averages. It should be stressed, though, that at least nine of every 10 or 93 percent of the respondents did record same-or-better sales in 1982, although slightly below the historic average of 95.4 percent.

Price increases less numerous

About 71 percent of the BPI members advanced their bedding plant prices in 1982, as price-increasing had slowed from the recent past (1979-1980-1981, respectively, 86 percent-91 percent-84 percent). However, scarcely any members, only one percent, actually lowered prices. Cost-push influences on price of inflation and energy had lessened in 1982 but the demand-pull influences on prices continue in most market situations. Price increases in 1983 may lessen from 1982 if inflation is not reignited. Note: prices largely will reflect the attentiveness and consequent adjustments of bedding-plant entrepreneurs in meeting customers' wishes. "It is always good strategy to understand customers and the market, and make appropriate business accommodations," commented Voigt. □

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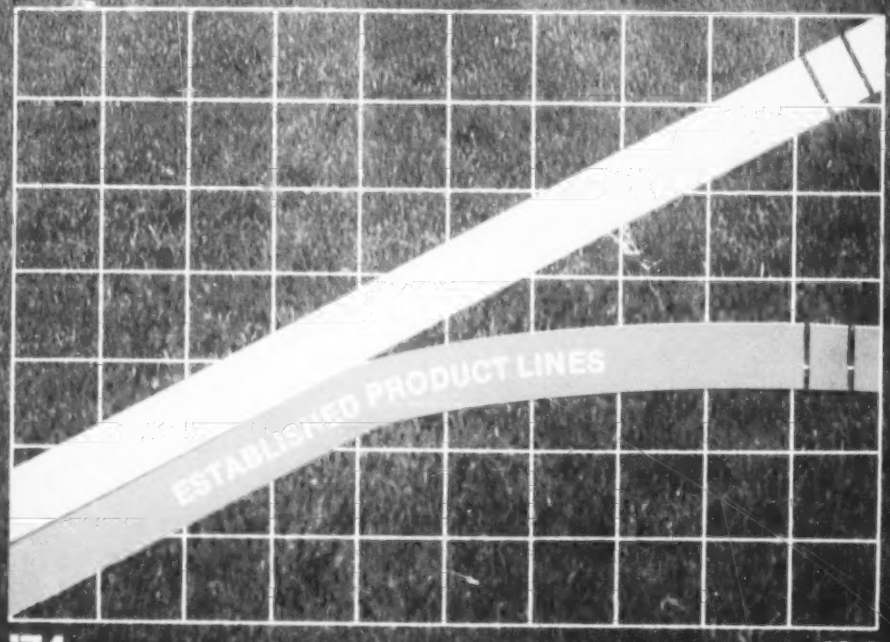
OCTOBER, 1983

Lawn & Garden Marketing

MARKET DATA ISSUE

Lawn and Garden Growth Patterns



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Lawn&Garden Marketing.

The merchandising magazine for lawn, garden and leisure living products.

12 **DIYers loyal to their lawns.** Preliminary data from the 1983 survey of consumers conducted by the Gallup organization show the number of households involved in lawn care, gardening and other aspects of home horticulture. For the first time dollar volume spent by households is reported by the GFA/Gallup study.

30 **Executive Forum: Growing the Market.** Comments from panelists and participants during a 90-minute forum on Growing the Market were edited to give diverse views and problems of media, suppliers and buyers.

8 **Changes sweep lawn and garden industry.** Data from a 1983 survey of retailers show changes in product mix, distribution patterns, decision making and other aspects of marketing. Successful new products helped offset declines in sales of some established product lines.

17 **ABC's of Snow Throwers.** Quick reference for retailers and their customers on fundamentals of walk-behind snow throwers.

22 **BBC mowers gaining?** An analysis and tables show results of survey of retailers about selling compliance mowers.

50 **President's viewpoint.** David Rolston, president of the OPEI, gives candid views on the state of the power equipment industry.

60 **Product movement report.** Quarterly survey of retailers covering eight key product categories.

70 **Association roster.** Annual updated listing and addresses of trade associations.

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Coming in November/December: A major West Coast retail company. The benefits to the manufacturers, retailers and consumers of pre-spring lawn and garden product shows is featured. Consultant Ed Bobrow discusses new products and how to introduce them to the public. Also: The ABC's of Lawn Fertilizers and the annual calendar of events for 1984.

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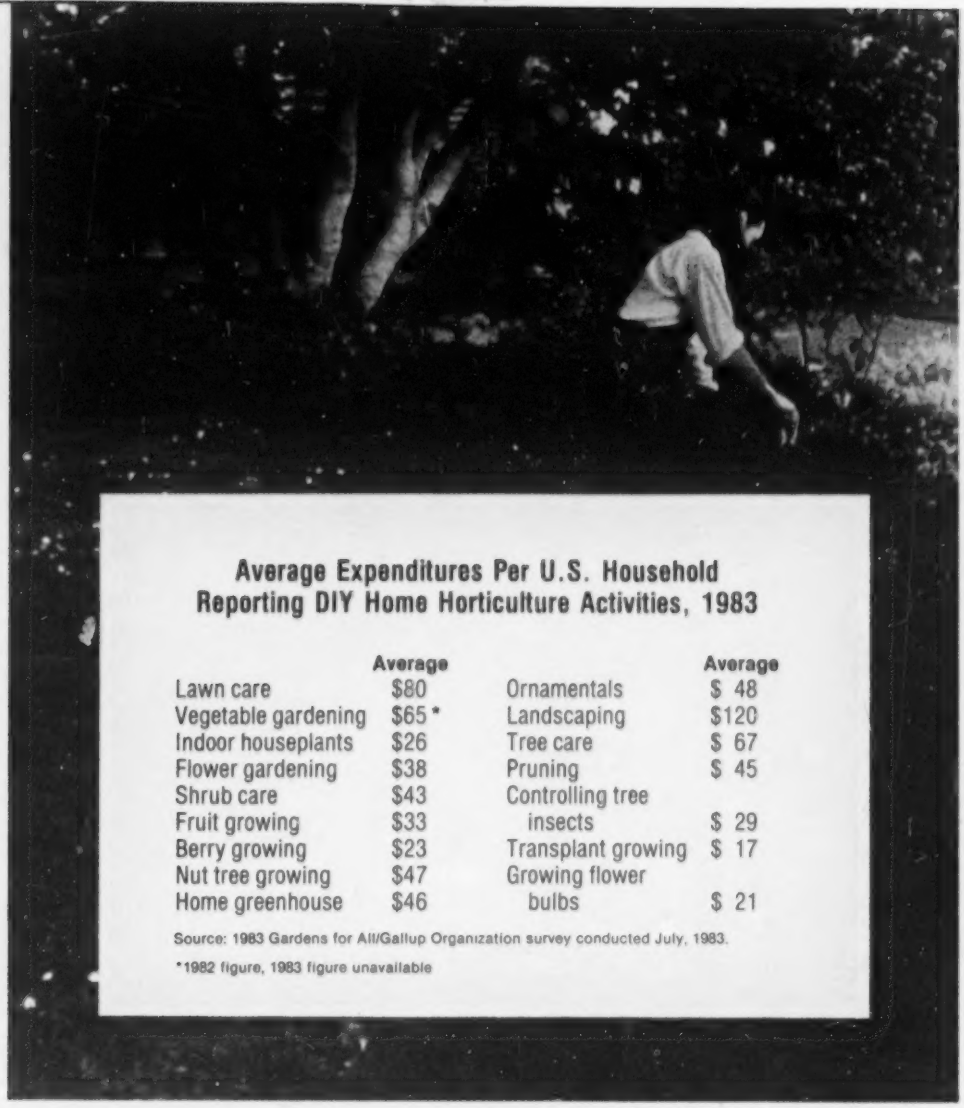


Average Expenditures Per U.S. Household Reporting DIY Home Horticulture Activities, 1983

	Average		Average
Lawn care	$80	Ornamentals	$ 48
Vegetable gardening	$65 *	Landscaping	$120
Indoor houseplants	$26	Tree care	$ 67
Flower gardening	$38	Pruning	$ 45
Shrub care	$43	Controlling tree insects	$ 29
Fruit growing	$33	Transplant growing	$ 17
Berry growing	$23	Growing flower bulbs	$ 21
Nut tree growing	$47		
Home greenhouse	$46		

Source: 1983 Gardens for All/Gallup Organization survey conducted July, 1983.

*1982 figure, 1983 figure unavailable

Photo credit: Reproduced with permission from the Ortho Book *All About Fertilizers, Soils & Water*, copyright 1979, Chevron Chemical Co.

DIYers loyal to lawn care tasks

■Sixty-three percent of U.S. households reported in 1983 some activities involving lawn care. Projections by **LGM** based on the averages reported spent by each household would show that, nationwide, approximately $4.24 billion was spent for DIY lawn care products. The projections are based on preliminary data from the Gardens for All/Gallup Organization 1983 survey. (Page 14 shows numbers of households engaged in lawn and garden activities.)

DIY landscaping totalled the second largest amount: $2.28 billion, averaging $120 per household.

At 63 percent, lawn care for the years of 1982 and 1983 is down slightly from the 65 percent reported in 1981, but because of population increases, the number of households caring for lawns remains about the same: approximately 53 million. This is a substantial increase from 1978 when this same annual survey reported that just 49 percent of the households indicated maintaining a lawn as a household activity. Numerically, about 37 million tended lawns that year.

Other types of DIY home horticultural activities decreased somewhat in 1983.

35 million growing vegetables

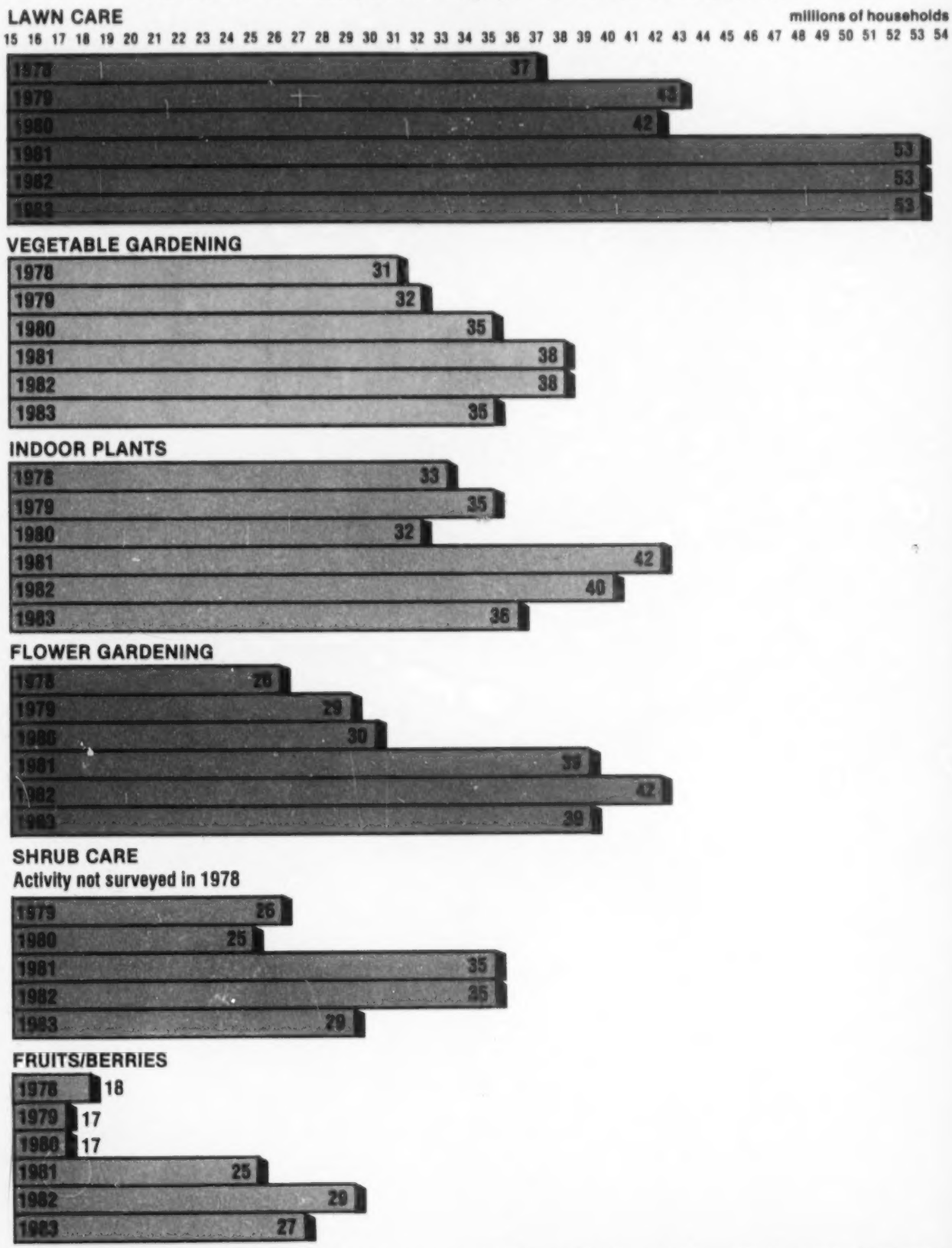
Vegetable gardening was down from 1982's 46 percent to 42 percent of all U.S. households in 1983. Even so, it continues to claim more than 35 million adherents. This is slightly above the 10 year average of 34-plus million food gardeners, according to Bruce Butterfield, research director, Gardens for All.

Forty-two percent is the lowest percentage of households reporting food gardens since 1978 when 41 percent of the households were producing edibles. Vegetable gardening peaked as did lawn care in 1981 with 47 percent raising food for their

continued...

6-year Comparison Study

Millions of U.S. Households Engaged in DIY Home Horticulture



Source: annual figures reported by the Gardens For All/Gallup Organization surveys, 1978 through 1983, and from the U.S. Bureau of Census. Figures have been rounded off and are therefore approximate.

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DIY Horticulture-Related Tasks

	Households	
	1982	1983
Controlling tree insects	39%	32%
Pruning	34	29
Tree care	30	25
Landscaping	26	23
Raising transplants	18	15

Source: 1983 Gardens for All/Gallup survey.

DIYers loyal

continued from page 14

tables. This added up to 38 million, the highest number of gardeners in American history.

Who's who in the garden?

These are not faceless numbers. The survey tells types of householders who garden as well as how many. Comparing 1983 with 1982, there now are 1.1 million fewer households gardening where there are children in the home. Vegetable gardening lost .5 million single person households, and one million from among the families headed by someone separated, divorced or widowed.

On the positive side, vegetable gardening gained .6 million married couples without children living at home (retired or older parents, or childless couples). There has been a 24 percent increase among non-whites.

The biggest drop in vegetable gardening in 1983, was in the Midwest and West. Numbers of gardens in cities and rural areas dwindled less than in small towns and suburbs where gardening activities had surged during the past two years.

It is interesting that eight million households reported to the survey that they had discontinued gardening in the last year but the total numbers tallied to a drop of only three million from 1982 figures. This indicates that five million other households either renewed dormant gardens or started vegetable gardens for the first time.

Flowers, houseplants dip

Flower gardening dipped to 47 percent in 1983, the same percentage as two years ago after an interim climb to 50 percent in 1982. The biggest drop appeared in the South. Down by eight to nine points, southern flower gardeners now stand at 37 percent. From the Midwest, 57 percent reported raising flowers. This was the highest among the regions.

Shrub care and growing fruits, berries and nuts showed no significant drop in any one region.

Houseplants decreased five percentage points, 48 percent to 43 percent, in households nationally. Regionally, the only pronounced reduction was reported from the West where 10 percent fewer households now care for indoor plants. □

Associations

...continued

National Farm & Power Equipment Dealers Assn., 10877 Watson Rd., St. Louis, MO 63127, (314) 821-7220. William E. Galbraith, executive vice president.

National Fertilizer Solutions Assn., 8823 N. Industrial Rd., Peoria, IL 61615, (309) 691-2870. David K. Murray, executive vice president.

National Garden Bureau, Inc., 628 Executive Drive, Willowbrook, IL 60521, (312) 655-0010. Kathy Zar-Peppler, executive director.

National Housewares Manufacturers Assn., 1324 Merchandise Mart, Chicago, IL 60654, (312) 644-3333. Ron Fippinger, managing director.

National Hydraulic Wood Splitter Manufacturers Assn., c/o Piqua Engineering Inc., P.O. Box 605, 125 Clark Ave., Piqua, OH 45356, (513) 773-2464. Arthur St. Hilaire, president.

National Kerosene Heater Assn., First American Center, No. 15, Nashville, TN 37238, (615) 254-1961. J. Thomas Smith, managing director.

National Landscape Assn., 1250 I St., N.W., Suite 500, Washington, DC 20005 (202) 789-2900. Robert F. Lederer, executive vice president.

National Lawn & Garden Distributors Assn., 1900 Arch St., Philadelphia, PA 19103, (215) 564-3484. Thomas A. Fernley III, executive vice president, William L. Robinson, executive director.

National Limestone Institute Inc., 1840 Wilson Blvd., Suite 203, Arlington, VA 22201. James H. Williams, president.

National Pest Control Assn., 8100 Oak St., Dunn Loring, VA 22027, (703) 573-8330. Jefferson D. Keith, executive vice president.

National Sprayer & Duster Assn., 680 Wrigley Bldg. North 410 N. Michigan Ave., Chicago, IL 60611, (312) 321-1470. R. Howell, executive secretary.

Nebraska Assn. of Nurserymen, P.O. Box 3702, Omaha, NE 68103, (402) 892-3457. Harlan Hamernik, president.

Netherlands Flower-bulb Institute Inc., 90 West St., New York, NY 10006, (212) 227-2106. Robert F. LaRue, director.

New England Equipment Dealers Assn., Rt. 9, Page Road, Box 327, Bow, NH 03301, (603) 225-5510. George M. Becker, managing director.

New England Nurserymen's Assn., 30 Lafayette Square, Room #109, Vernon, CT 06066, (203) 872-2095. Larry Carville, executive secretary.

New Jersey Assn. of Nurserymen Inc., 233 Blake Hall, P.O. Box 231, Cook College, Rutgers University, New Brunswick, NJ 08903, (201) 828-2325. Larry D. Little Jr., secretary.

New York State Nurserymen's Assn., 230 Park Ave., New York, NY 10017, (212) 685-4579. Margaret Herbst, executive secretary.

Ohio Nurserymen's Assn. Inc., 2021 E. Dublin-Granville Road, Suite 185, Columbus, OH 43229, (614) 431-2452. Bill Stalter, executive director.

Oklahoma Turfgrass Research Foundation Inc., 3318 Maloney Dr., Oklahoma City, OK 73121, (405) 427-1454, days. Don Parcel, secretary.

Oregon Assn. of Nurserymen, 2780 S.E. Harrison, Milwaukie, OR 97222, (503) 653-8733. Dan Barnhart, executive director.

Oregon Fine Fescue Commission, 2140 Turner Rd., S.E., Salem, OR 97302, (503) 585-1157. David S. Nelson, administrator.

Ornamental Growers Assn., P.O. Box 112, Fox River Grove, IL 60021, (312) 546-9222. Cindy Jakymiw, executive secretary.

Outdoor Power Equipment Assn., c/o B&K Mowers, 6002 Maple, Omaha, NE 68104, (402) 553-2083. Bill Kiebunde, president.

Outdoor Power Equipment Distributors Assn., 1900 Arch St., Philadelphia, PA 19103, (215) 564-3484. John W. Kane, executive director.

Outdoor Power Equipment Institute Inc., 1901 L St. N.W., Suite 700, Washington, DC 20036, (202) 296-3484. Dennis C. Dix, executive director and chief operating officer.

Outdoor Power Equipment Service Dealers Assn., c/o Dobcah Service Center, 5167 Brownsville Rd., Pittsburgh, PA 15236, (412) 892-2245. Sally Davis, secretary-treasurer.

The Pennsylvania Nurserymen's Assn., 234 State St., Harrisburg, PA 17101, (717) 238-1673. Charles V. Sala, executive director.

Perlite Institute Inc., 45 W. 45th St., New York, NY 10036, (212) 382-0070. R. S. Milanese, managing director.

Point-of-Purchase Advertising Institute, Two Executive Drive, Fort Lee, NJ 07024, (201) 585-8400. John M. Kawula, vice president.

Produce Marketing Assn., 700 Barksdale Plaza, Newark, DE 19711, (302) 738-7100.

Professional Grounds Management Society, 7 Church Lane, Suite 13, Pikesville, MD 21208, (301) 653-2742. Allan Shulder, executive director.

Professional Lawn Care Assn. of America, 1225 Johnson Ferry Rd., N.E., Suite B-220, Marietta, GA 30067, (404) 977-5222. J. Martin Erbaugh, president.

Rhode Island Nurserymen's Assn. Inc., 316 Woodward Hall, University of Rhode Island, Kingston, RI 02881, (401) 792-2791. John J. McGuire, executive secretary.

Small Engine Dealers Assn. of San Diego, 81-405 Hwy. 111, Indio, CA 92202, (619) 347-3155. George Sakemi, president.

South Carolina Nurserymen's Assn., Horticulture Dept., Clemson University, Clemson, SC 29631, (803) 656-3405. J. P. Fulmer, executive secretary.

continued...

BBC mowers gaining?

Sales and outlook for 4 types of compliance mowers based on 1983 LGM survey of retailers. By Marjorie Riggin.

■Somewhere between the rainbow and the doomsayers stand the results of the compliance mowers' first year on the market. But where?

Data gained in a survey in mid-season point to a gain in market share by BBC units.

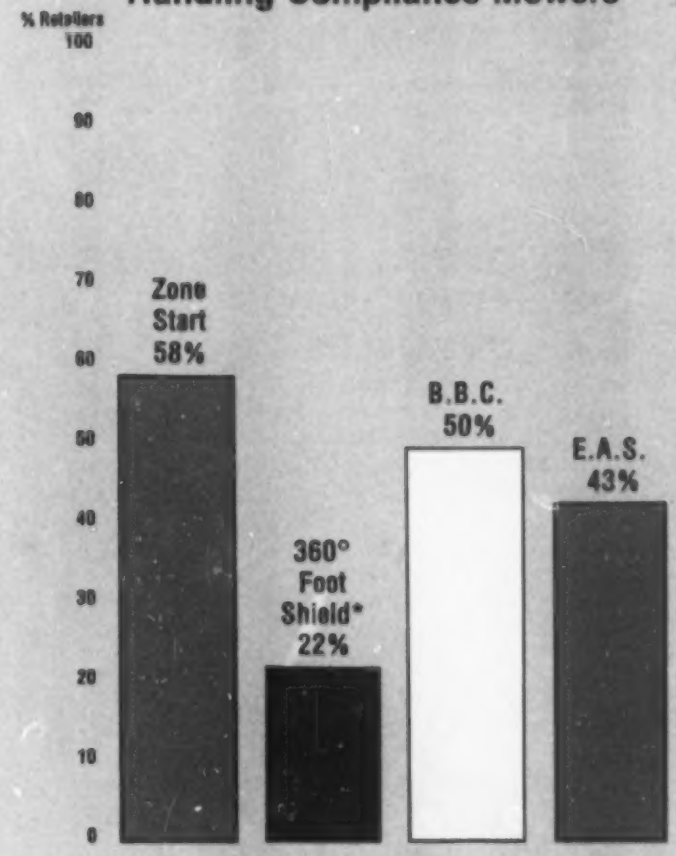
Questionnaires on this subject were mailed to multi-department stores, hardware/home and power equipment retailer-recipients of **Lawn & Garden Marketing** magazine. Responses from the group reflected dealer attitudes and public acceptance as being on the positive side.

Zone starts moving

More zone start mowers are stocked by responding retailers than the other three models. Of the 58 percent (see Table A) that handle these mowers, the highest regional percentage—73 percent—reported from the West, compared with 58 percent from the Northeast, 58 percent, North Central, and 47 percent, South.

(Table A)

Handling Compliance Mowers



Among the three categories of retailers surveyed, 60 percent of the responding hardware/home center dealers handle zone start mowers, 59 percent of the power equipment dealers and 50 percent, so reported by multi-department stores.

Cutting a sales swath

Snapper and Flymo are the only two companies manufacturing 360° foot shield mowers. Twenty two percent of the responding retailers, all regions, reported handling this style of compliance mower with the fewest of these, 13 percent, from the South. Other percentages of those stocking the 360° foot shield option mower: 35 percent, West; 33 percent, Northeast and 17 percent, North Central regions.

Compared with mowers of the other three complying designs, this type of mower met sales expectations of the highest percentage nationally of responding retailers, 59 percent (see Table C).

BBC moving up

Of the 50 percent reporting that they handle blade-brake clutch mowers, more than half—56 percent—are hardware/home dealers. Distribution among the regions is fairly even: 51 percent, Northeast; 56 percent, North Central and 54 percent, West. Only the South indicated a markedly lower 32 percentage of retailer-respondents carrying BBC units.

Reordering plans for BBC's to be sold in 1983-'83 were expressed by a larger percentage of respondents—37 percent—than were indicated for other types of compliance mowers (see Table C). An equal 37 percent will order the *same* number of BBC's as in 1982-'83, however, and 14 percent plan to order fewer of the BBC mowers.

Northeast best for EAS

Fewer than 50 percent of the retailers selling compliance mowers who replied to the survey stock the

continued...

DIXON ZTR mowers turn on sales, turn on profits, turn on a dime.

DIXON ZTR mowers sell as quick as they mow— and just as easy. Since 1974, Dixon's Zero Turning Radius "mowbility" has been selling itself. Still, every Dixon Dealer is backed with a quality lineup of 5 competitively priced models, strong national and local advertising, free Yellow Pages, and generous co-op terms.

Best of all, you won't find a Dixon Dealer on every corner. We give you room to grow... we know you'll need it!

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Coffeyville, Kansas 67337
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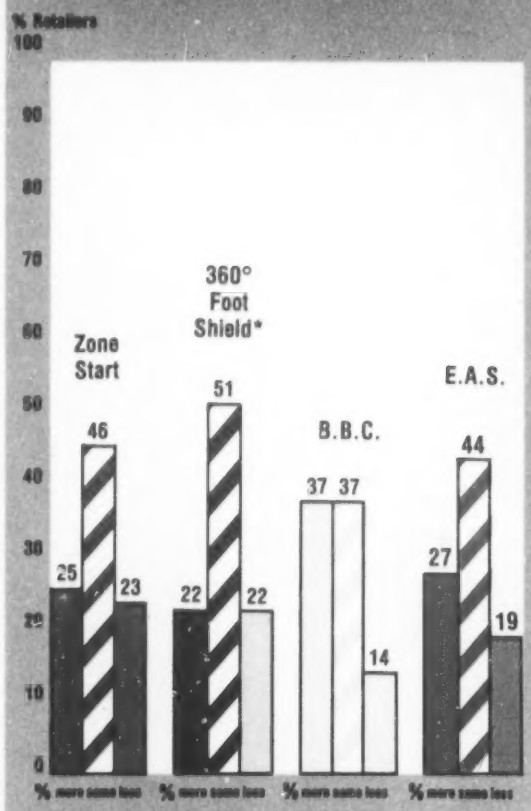
DIXON ZTR 10 Anniversary 1974-1984

Dixon Industries, Inc.

Circle (13) on Reply Card

(Table B)
Retailers Reordering Plans
(for 1983-1984, compliance mowers)



*Snapper and Flymo

Source: 1983 LGM survey

BBC mowers ...continued

electric alternator start unit. Totally, 43 percent; regionally, an equal 46 percent in the Northeast, North Central and West. Fewest—26 percent—retailers responding from the South confirmed that they carry the EAS. As to types of retailers, fewer multi-department stores, 27 percent, handle EAS than do the hardware/home, 38 percent, and power equipment dealers, 57 percent.

EAS mowers appear to sell best in the Northeast, where 70 percent of the reporting dealers show sales amounting to 75 percent or more of their inventory. Also in the Northeast, sales met the expectations of 65 percent of the dealers.

Quality, profit and acceptance

Survey questions eliciting specific, written responses concerned:

- Compliance mowers' profitability
- Consumer acceptance of compliance mowers
- Compliance mowers' quality

continued...

Sixty five percent of the responding dealers made positive comments about the quality of compliance mowers, generally, and were conspicuously loyal to the lines they carried. Only 23 percent of the comments are negative; the remaining 12 percent, neutral. From the Northeast, a multi-department store dealer says, "Excellent—we had no problems"; power equipment dealers say, "No problems to date on zone units," and "(Safety) is a large selling factor." But a pithier comment from a PE dealer in this region labels both "cheap" compliance mowers and "some better known names" as "junk."

From around the country concerning quality: "...there are only three extra parts...so they are as good (I feel better than) non-compliance mowers." "Our line is very good quality...you can't beat it." and "Good, especially (our) blade-brake clutch system." A southern dealer writes "Same quality, with a slight decrease in repairs," but a dissenting North Central voice: "Extensive use of plastic controls does not look durable."

Can the unconvinced convince?

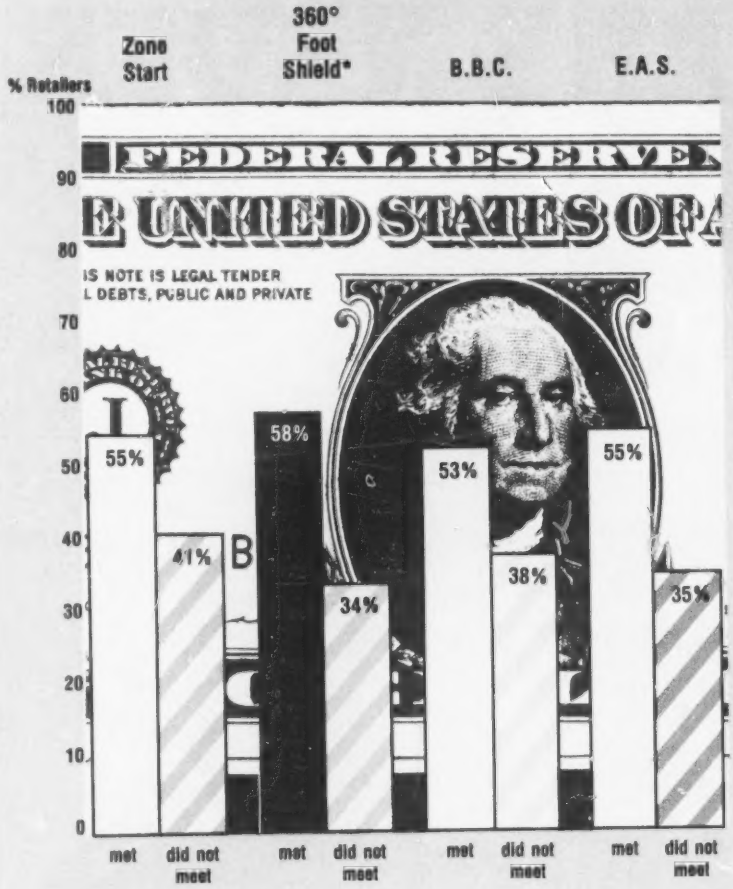
Comments on consumer acceptance of the compliance mowers ranged from assuredly positive to determinedly negative. From a power equipment dealer in the Northeast where positive comments outweighed the negative by 40 percent, came this perceptive assessment,

"Consumers accepted compliance mowers if the salesperson took the time to explain how they work, and the safety factors." A North Central dealer writes, "Well accepted, if they are sold with a **positive** attitude."

North Central responses, however, were 54 percent more negative than positive on this score, indicating that their customers are not necessarily as "compliant" as the mowers.

(Table C)

How Sales Met Expectations 1983-1984



*Snapper and Flymo

Source: 1983 LGM survey

In the South, with 25 percent more negative than positive responses, compliance mowers were "forced on customers," according to one dealer, but "sold by the satisfied customers" of another. Although the West leaned toward the positive, price was an objection. A mixed comment pointed out "Consumers accept the compliance features but resist the accompanying price increase." From all the regions, price was mentioned as a problem in many of the negative responses.

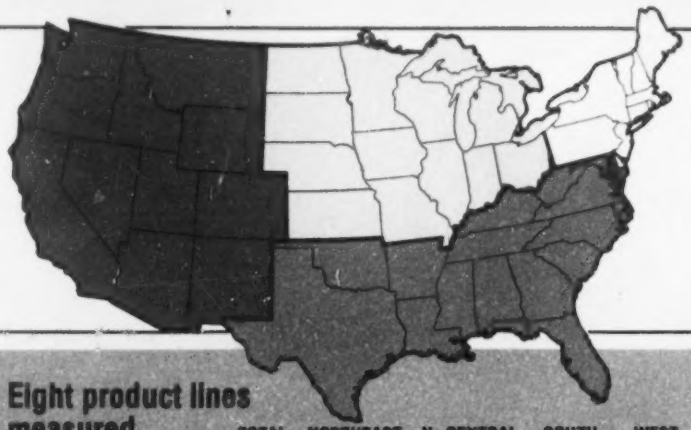
Profitability an issue

The question of the mowers' profitability raised some hackles, especially in the North Central and South regions. A southern power equipment dealer unknowingly countered the highlighted quotes when he wrote," ...if the dealer now has to spend more time selling and explaining the features of these machines, the profit structure needs to be revised to a minimum of 25 percent for the dealer." A few were satisfied; many more gave neutral or negative responses in the ratio of three of every 10 responses, positive, and seven of every 10, either negative or neutral.

Asked for additional comments, dealers leaned toward non-compliance mowers, with a North Central PE dealer decrying the compliance mower law as "a shame!"

Concerning this survey, a North Central PE dealer writes, "...now we can see how the other dealers are doing—and it just doesn't show how many (mowers) the manufacturers made." □

Product Movement Report
summer, 1983



■The season just completed was a better one for retailers of lawn and garden products than was the spring and summer of 1982, according to respondents to **LGM**'s product movement survey. That is the overall picture for the summer months, although there were many regional variations in sales trends, due primarily to weather.

Walk-behind mower sales nationwide were reported to be the same or up by two thirds of the respondents, 10 percent more than for the same period in 1982. In the Northwest, 10 percent more reported increased sales. In the South and West regions, the number of respondents indicating increased sales was about double compared to last year. Sales were down in the North Central region, but have shown a tiny gain over last year. Spring sales were reported to be much higher, at 44 percent, which is normal. The North Central region was hit particularly hard by the summer drought and includes cities such as Detroit that are still mired in economic difficulties.

Inventories of walk-behind mowers are up a bit, most notably in the South. Fewer retailers reported zero inventory than last year. This year 5 percent reported zero inventory, compared with last year's 10 percent.

Riding mower/lawn tractor sales are improving overall. As prices on walk-behind mowers rise closer to prices for riding mowers, riding mowers may be stealing some walk-behind sales. Nearly two-thirds of the respondents reported sales to be up or the same, a 6 percent increase over last year. Sales are up in the South and the same in the North Central. Although more respondents from the West reported sales to be down (25 percent) than up (21 percent), this is a big improvement over last year, when 75 percent reported decreased sales. The Northeast region reported sales to be down. As with the walk-behind mowers, spring sales were better.

It's been a good year for spin trimmers. More retailers are carrying them and more are reporting increased sales. Though last year's report showed good sales, 15 percent more of this year's respondents reported sales to be up.

Replacement parts sales are still in a boom stage, but the boom appears to be leveling off, as the increase in sales of new mowers would indicate. Parts sales are increasing, but the rate of increase has slowed.

Chemical sales were surveyed in multi-department and hardware/home stores, while garden centers were surveyed on two types of chemicals, herbicides and insecticides. These categories were reported to be up overall, except in the Northeast, where chemicals and insecticides were reported to be down, and in the North Central, with herbicides reported down.

Watering equipment sales increased, probably because of the drought. Sales were up significantly in the Northeast and North Central, up slightly in the South, and about the same in the West. □

Eight product lines measured

		TOTAL %	NORTHEAST %	N. CENTRAL %	SOUTH %	WEST %
Walk-Behind Mowers	Up	31.1	26.5	19.9	45.0	43.2
	Same	36.6	42.9	37.6	31.7	34.0
	Down	20.5	16.3	26.7	16.6	16.0
Riding Mowers/LTs	Up	33.8	20.6	33.3	55.6	20.9
	Same	29.8	44.2	24.6	22.1	33.3
	Down	26.5	26.4	33.3	16.7	25.0
Spin Trimmers	Up	42.5	36.9	41.6	46.7	45.5
	Same	30.6	40.8	22.8	31.6	36.3
	Down	11.9	8.0	15.0	11.7	9.1
Replacement Parts	Up	63.5	67.7	54.4	66.7	75.0
	Same	27.9	29.4	31.5	22.2	25.0
	Down	6.0	.....	10.6	8.3	.....
Chemicals	Up	34.1	20.0	32.0	37.6	45.0
	Same	38.7	46.6	36.1	45.7	30.0
	Down	12.6	26.7	11.5	8.4	10.0
Herbicides	Up	33.0	26.4	12.8	54.6	36.4
	Same	43.5	47.3	55.0	24.3	63.6
	Down	13.9	21.0	22.5	6.0	.....
Insecticides	Up	40.4	26.3	41.9	51.6	27.3
	Same	37.3	31.5	41.9	27.3	63.6
	Down	17.0	36.9	16.2	9.0	9.1
Garden Tools	Up	16.0	21.1	12.9	21.3	.....
	Same	61.6	63.0	67.8	45.3	90.9
	Down	17.1	15.9	12.9	24.3	9.1
Watering Equipment	Up	41.7	61.6	50.7	29.9	19.3
	Same	37.1	26.7	30.6	36.7	64.6
	Down	10.5	5.8	6.7	15.9	16.1
		Because of multiple responses, percentages do not add to 100%				
Current inventory of walk-behind mowers (median no. of units per store)		16 units	17 units	13 units	18 units	14 units

**The mass merchandisers' and hardware/home centers' questionnaire asked for information on horticultural chemicals. The questionnaire to garden centers broke down horticultural chemicals into herbicides and insecticides.*

Eight product lines sold through four key classes of retailers were measured by **LGM** for this survey.